

Top 10 Reasons Proposals Don't Win

U.S. Department of Energy
Small Business Forum & Expo
June 10 – 12, 2014
Tampa, Florida

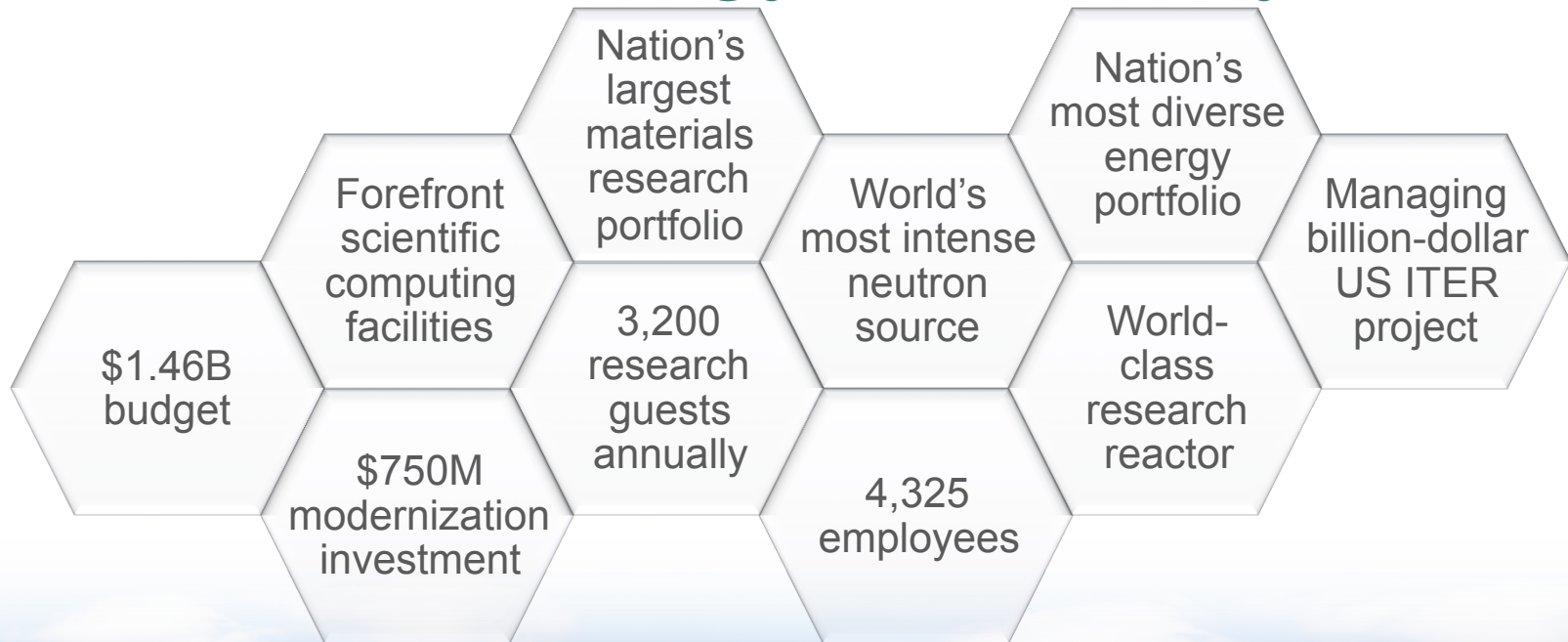
Presented by:
Sonny Rogers
Tena Nelson
Cassandra McGee Stuart

Oak Ridge National Laboratory



U.S. Department of Energy — 13th Annual Small Business Forum & Expo
June 10-12, 2014 - Tampa, FL

ORNL is DOE's largest science and energy laboratory



ORNL is managed by UT-Battelle, LLC

The University of Tennessee



Battelle Memorial



- An ORNL partner since 1946
- State-funded Science Alliance started in 1982, to build programs with ORNL
- Shared research and joint appointments
- Joint institutes in advanced materials, biological sciences, computational sciences, neutron sciences, and nuclear physics

- A 65-year relationship with DOE
- Develops and deploys technology worldwide
- Manages or co-manages 6 DOE national laboratories:
ORNL (with UT),
Brookhaven (with SUNY-Stony Brook),
Idaho, Lawrence Livermore (with UC and Bechtel)
NREL (with MRI), and Pacific Northwest

Small Business Programs Office : Mission



Serve As A Point of Contact

Advocate On Behalf of Small Businesses

Communicate Subcontracting Opportunities

Manage the ORNL Mentor-Protégé Program

- Promotes developmental opportunities with Small Businesses and HBCUs/MEIs

Steps to Doing Business with ORNL

- Register your business in the **System for Award Management (SAM)**

www.sam.gov

(formerly CCR)

The screenshot shows the SAM website interface. At the top left is the SAM logo with the text 'SYSTEM FOR AWARD MANAGEMENT'. To the right are input fields for 'USER NAME' and 'PASSWORD', a 'LOG IN' button, and links for 'Forgot Username?' and 'Forgot Password?'. A 'Create an Account' link is at the bottom right of the login section. Below this is a dark blue navigation bar with links: HOME, SEARCH RECORDS, DATA ACCESS, GENERAL INFO, and HELP. The main content area has three columns: 'CREATE USER ACCOUNT' (explaining the need for a new SAM account), 'REGISTER/UPDATE ENTITY' (explaining the process for businesses and government agencies), and 'SEARCH RECORDS' (explaining how to search for records). Each column has a corresponding button: 'Create User Account', 'Register/Update Entity', and 'Search Records'. Below the columns is a 'WHAT IS SAM?' section with a 'Need Help?' link. The 'WHAT IS SAM?' section contains text about the system's purpose and a link to 'User guides and webinars'. At the bottom are three links: 'NEWS AND ANNOUNCEMENTS', 'USER GUIDES/HELPFUL HINTS', and 'FORMER CCR REGISTRANTS'. The 'FORMER CCR REGISTRANTS' link has a sub-link 'FREE SAM WEBINAR: Encore for'.

SAM
SYSTEM FOR AWARD MANAGEMENT

USER NAME PASSWORD **LOG IN**
[Forgot Username?](#) [Forgot Password?](#) [Create an Account](#)

HOME | **SEARCH RECORDS** | **DATA ACCESS** | **GENERAL INFO** | **HELP**

CREATE USER ACCOUNT
Your CCR username will not work in SAM. You will need a new SAM User Account to register or update your entity records. You will also need to create a SAM User Account if you are a government official and need to create Exclusions or search for FOUO information.
[Create User Account](#)

REGISTER/UPDATE ENTITY
You can register your Entity (business, individual, or government agency) to do business with the Federal Government. If you are interested in registering or updating your Entity, you must first create a user account.
[Register/Update Entity](#)

SEARCH RECORDS
All entity records from CCR/FedReg and ORCA and exclusion records from EPLS, active or expired, were moved to SAM. You can search these records and new ones created in SAM. If you are a government user logged in with your SAM user account, you will automatically have access to FOUO information.
[Search Records](#)

WHAT IS SAM? [Need Help?](#)
The **System for Award Management (SAM)** is the Official U.S. Government system that consolidated the capabilities of CCR/FedReg, ORCA, and EPLS. There is NO fee to register for this site. Entities may register at no cost directly from this page. User guides and webinars are available under the Help tab.

[NEWS AND ANNOUNCEMENTS](#) | [USER GUIDES/HELPFUL HINTS](#) | [FORMER CCR REGISTRANTS](#)
[FREE SAM WEBINAR: Encore for](#) Additional information, such as a full If you had an active record in CCR, you have an active record in SAM. You do not

Steps to Doing Business with ORNL

- Visit the ORNL Small Business website at <http://info.ornl.gov/sites/sbpo>

OAK RIDGE NATIONAL LABORATORY
Managed by UT-Battelle for the Department of Energy

ORNL SITE INDEX SEARCH VISIT US FIND PEOPLE

Home | News at a Glance | How to Do Business | Awards and Honors | Contact Us

Small Business Programs Office

Supplier Information Database

Note: This is a general supplier database. This database DOES NOT prequalify you or guarantee you subcontracts.

****Please read the instructions before attempting to add or update an entry.**

Add or Update an Entry

Instructions

Supplier Registration

If you are unable to complete the registration or have questions, please send a message to our supplier relationship administrators at vendoradm@ornl.gov or call 865-574-1011, 865-576-1462, or 865-241-3632.

Information Needed at Registration Supplier Identification

- Legal Business Name: Enter the legal name by which you are incorporated and pay taxes. The legal business name as entered must match the legal business name at Dun and Bradstreet.
- Doing Business As (DBA): If you commonly use another name, such as a franchise, licensee name, or an acronym, enter that in the DBA field. Do not enter "same" or "as shown above" in

Links You May Need

- Battelle Labs
- Contracts Services Division
- Department Of Energy - Headquarters (DOE-HQ)
- Department Of Energy - Oak Ridge Operations (DOE-ORO)
- DOE National Laboratories
- DOE Office of Small and Disadvantaged Business Utilization (OSDBU)
- Electronic Subcontracting(eSRS) Reporting System
- FedBizOpps
- Federal Acquisition Regulation (FAR)
- SCORE
- Set-Aside Alert Opportunities
- Small Business Administration (SBA)
- State of Tennessee

Steps to Doing Business with ORNL

- Send the ORNL Small Business Programs Office a

ONE PAGE

Capability Statement

- Call, e-mail or visit the ORNL Small Business Programs Office
- Visit our Business Opportunities Page for subcontracting opportunities



Visit our website at: <https://info.ornl.gov/sites/sbpo>

Acquisition Management Services Director: LeAnne Stribley – 865-576-0274

ORNL Small Business Programs Manager: Cassandra McGee Stuart – 865-576-3560

BUSINESS OPPORTUNITIES

Type	Description	Small Business Set-Aside	Estimated Value	NAICS Code	Anticipated Issue Date	Anticipated Award Date	Contact Name	Contact Tel #	Contact Email
Staff Augmentation	Fire Protection Engineering and Technical Services	Yes	\$3-4M	541330	Jul-14	TBD	Brad Dunsmore	865-576-1525	dunsmorerb@ornl.gov
Service	Second Line of Defense (SLD) Program Forward Deployment Technical Support	No	\$10M	541990	May 2014* *Qualification Criteria: Must have experience supporting SLD Program	Aug-14	Stacey Johnson	865-576-0718	johnsonsl@ornl.gov
Service	Second Line of Defense (SLD) Program Technical Support	No	\$25M	541990	May 2014* *Qualification Criteria: Must have experience supporting SLD Program	Aug-14	Stacey Johnson	865-576-0718	johnsonsl@ornl.gov
Fabricated Equipment	CS Structure Tie Plates WBS 1.1.1.2	No	>\$1M	332710, 331221, 332111, 332112, 332313, 332999	Jul-14	TBD	Kelly West	865-576-6880	lucettwestk@ornl.gov
Fabricated Equipment	Fabricate Gas-Cooled 50ohm Lines WBS 1.5.1.1	No	>\$10M	334419	Sep-14	TBD	Kelly West	865-576-6880	lucettwestk@ornl.gov
Fabricated Equipment	Central Solenoid Tie Plate Fabrication	TBD	\$4M	TBD	TBD	TBD	Lynn Taylor	865-241-9492	taylorlma@ornl.gov
Fabricated Equipment	Design, Manufacture, and Install Linear Motion System	TBD	<\$750k	339995, 541490	Jun-14	Aug-14	Scarlett Clark	865-576-1614	clarksr@ornl.gov
Fabricated Equipment	Design and Fabricate Water Cooled Lines, Tees and Elbows - WBS 1.5.2.1.2	No	<\$500k	541330 334419	Jul-14	TBD	Kelly West	865-576-6880	lucettwestk@ornl.gov

You're going to bid – Now what?

- Take a good, close look at what you're about to submit
- It can mean the difference between **WINNING** or LOSING a job



ORNL Contracts Staff Survey

Challenges Seen in Small Business Subcontracting Process

- ✓ Lack of thoroughness in reading solicitations; not paying attention to detail
- ✓ Lack of thoroughness in submitting proposals
- ✓ Not realizing capabilities and limits
- ✓ Attitude
- ✓ No prior experience with ORNL (or any Laboratory)
- ✓ Lack of business knowledge
- ✓ Inadequate breakdown of cost proposal
- ✓ Impatience

Top Ten Reasons Proposals Don't Win

1. Didn't follow the proposal instructions

2. Didn't return the requested forms

3. Didn't address the Evaluation Criteria as described in the Proposal Format

4. Technical proposal just regurgitated Statement of Work

5. Didn't adhere to page limit; too wordy

6. Didn't state the assumptions or the basis for the proposed costs

7. Poor safety record

8. Lack of understanding regarding the work

9. Lack of documented past performance

10. Cost/Price

Examples

Example 1

“Unfortunately the vendor for this particular solicitation was eliminated at the start of the proposal evaluation process because they failed to provide the requirements that were clearly stated in the solicitation”

Examples

Example 1

The solicitation clearly stated the following:

**Qualification Criteria*

To be considered for an award, a prospective offeror/offerors team shall meet the following requirement:

OCI/Punchout Catalog Requirement

To be considered for award a prospective offeror/offerors team shall be able to provide a OCI/Punchout catalog as detailed in the attachments to this solicitation.

Examples

Example 1

Note: The vendor did not address this section of the solicitation and did not provide the requested OCI/ Punchout catalog. The main reason for this solicitation is to award an agreement to a vendor that has a OCI/ Punchout Catalog.

Therefore, being able to test the catalog is very important. The vendor should have recognized this a very important requirement.

Examples

Example 2

Solicitation clearly stated the following:

**Technical Criteria*

Basis of Award – Tradeoff

(a) An award resulting from this solicitation will be made to the responsible offeror(s) that submits a proposal that is determined to provide the best value to the Company considering both technical merit and cost/price.

Examples

Example 2

Solicitation clearly stated the following:

**Technical Criteria*

Basis of Award – Tradeoff

(b) The technical evaluation process consists of the proposals being reviewed, evaluated and rated using a graded system that assesses the degree of compliance with the Technical Criteria requirements and the level-of-performance risk.

Examples

(c) The Technical Criteria are listed below:

Criteria 1: Catalog Quality and Scope

Criteria 2: OCI/Punchout Functionality

Criteria 3: Corporate Experience and Past Performance

Criteria 4: Inventory Availability and Delivery

Criteria 5: Ability of the Offeror to Support the goals of the Company's Small Business and Environmentally Preferable Product programs

(The criteria are listed in descending order of importance.)

Note: This clearly states what is most important and unfortunately, the vendor did not address the two most important items being evaluated.

Examples

What went wrong?

- Vendor did not carefully read the instructions regarding what was requested. *Result?* No OCI/ Punchout catalog was provided to evaluate
- Vendor did not grasp the evaluation process. The top two technical criteria to be evaluated were listed, but the vendor did not provide the most important criteria.

Points to Remember

- **Ask questions – If something is confusing and not clear contact the Subcontract Administrator and ask for clarification.**
- **Do not get lost in all of the solicitation information. Break it down into sections:**
 - What are the qualifications?
 - What is most important criteria?
 - What is the deadline?
 - Who is my main contact?, etc.

Points to Remember

- Do not assume that the person(s) evaluating your proposal are familiar with you as a vendor. The evaluators will have a checklist of what was required for that particular solicitation, and if this information is not provided, then that section of that evaluation will be considered *non-compliant*.

ORNL Acquisition Staff Survey

Challenges Seen in Small Businesses Performing Subcontracts

- ✓ **Communication**
- ✓ **Inadequate Project Management**
- ✓ **Poor infrastructure and accounting system**
- ✓ **Damaging or destroying relationships with ORNL staff**
- ✓ **Gradually adhering to safety standards**
- ✓ **Lack of defined agreement with subcontractors**
- ✓ **Inflexibility**

Strategies for Success

- Know the organization
- Be competitive
- Know small business requirements
- Pay attention to detail
- Exceed customer expectations



OAK RIDGE NATIONAL LABORATORY

MANAGED BY UT-BATTELLE FOR THE DEPARTMENT OF ENERGY

Cassandra McGee Stuart Manager, Small Business Program

865-576-3560

mcgeecm@ornl.gov

<http://info.ornl.gov/sites/sbpo>

P.O. Box 2008

MS-6419

Oak Ridge, TN 37830



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Oak Ridge National Laboratory:

Meeting the challenges of the 21st century

